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Golf Participation in the United States 1985

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Market Facts, Inc.
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NGF

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INTRODUCTION

Two of the most frequently asked questions we receive at the National Golf Foundation (NGF) are: 1) How many golfers are there?; and, 2) How many golf courses are there? The NGF has always been able to provide an accurate answer to the latter question, given that we have been keeping an up to date inventory of the nation's golf facilities for the past fifty years. Complete information on the number, type, size, and location of golf facilities is presented in our publication entitled **Golf Facilities in the United States**.

But while we have always had a fairly good idea of the number of golfers, we felt that our information could be improved. That's why in 1985 we decided to undertake the largest study of golf participation ever conducted in the United States. To accomplish the study, we teamed up with MARKET FACTS, INC., one of the nation's largest marketing research companies.

This report, **Golf Participation in the United States**, prepared for the NGF by MARKET FACTS, INC., presents the results of our study. It represents the most accurate information available on the number of U.S. golfers. We plan to repeat this study of golf participation every two years in order to accurately monitor trends and provide you with current information. I would welcome any comments or suggestions you might have for future studies.

Thank you for your support.

Joseph F. Beditz, Ph.D.
Vice President of Research
National Golf Foundation

METHODOLOGY

The golf participation survey was conducted by mail using the Consumer Mail Panel (CMP) of MARKET FACTS. The CMP is a representative sample of over 200,000 households located throughout the United States.

For this survey, a nationally representative sample of 20,000 households was selected from the larger CMP and mailed a questionnaire on October 2, 1985. Households in the sample were balanced to United States Census statistics in terms of geographic region, household size and income, area population density and market size, and age of head of household. The national population includes only those age five and over.

The questionnaire was designed to obtain both current and past year golf participation data for individual household members age five and over. A copy of the questionnaire is presented in Appendix A.

By the response cutoff date of November 2, 1985, nearly 13,600 households had returned usable questionnaires resulting in information from over 34,000 individuals age five and over. The high response rate of 68 percent is typical when using established survey panels. However, as an additional step to ensure the national representativeness of the results, the return sample was weighted (adjusted) to match United States Census statistics on key demographic variables. We project a margin of error of (+ or - .2%) at the 95% confidence level for national participation rates.

DISCUSSION OF FINDINGS

I. Incidence of Golf Participation Nationally

1. Respondents were asked to indicate whether or not they played golf in the past two years and past 12 months. Overall, 9.7% of respondents (age 5 and over) surveyed claimed to have played golf in the past 2 years (21.30 million past 2 year golfers). However, only 8.0% of all respondents claimed to have played in the past 12 months (17.52 million past 12 month golfers).

2. Approximately 3.78 million people played golf in the past 2 years but not in the past 12 months. Thus, there appears to be a rather large segment of people who play less frequently than once a year.

	% of All People	National Population (Millions)
Played golf in past two years	9.7	21.30
Played one or more times in past 12 months	8.0	17.52
Did not play in past 12 months	1.7	3.78
Did not play golf in past two years	90.3	197.70
(Number of Respondents)	(34,685)	(219.00)

3. Respondents who claimed to have played golf in the past 12 months were asked to indicate when they first started to play. Nearly 14% of all past 12 month golfers claimed to have first played in the past 12 months (1.1% of all people). Therefore, about 2.44 million people started playing golf in the past 12 months.

	% of All People	% of All Past 12 Month Golfers	National Population (Millions)
Played golf in past 12 months	8.0	100.0	17.52
Started in past 12 months	1.1	13.9	2.44
Started over 12 months ago	6.9	86.1	15.08
(Number of respondents)	(34,685)	(2,760)	(219.00)

4. The estimated number of people who played golf over 12 months ago is 18.86 million or nearly 8.6% of all people age 5 and over.

	% of All People	National Population
Played golf over 12 months ago	8.6	18.86
Played in past 12 months and started over 12 months ago	6.9	15.08
Played in past 2 years but not in past 12 months	1.7	3.78
(Number of respondents)	(34,685)	(219.00)

5. In summary, the number of past 12 month golfers age 5 and over declined between October 1984 and 1985. The estimated number of past 12 month golfers in the United States decreased by approximately 1.34 million or 7.1% between years.

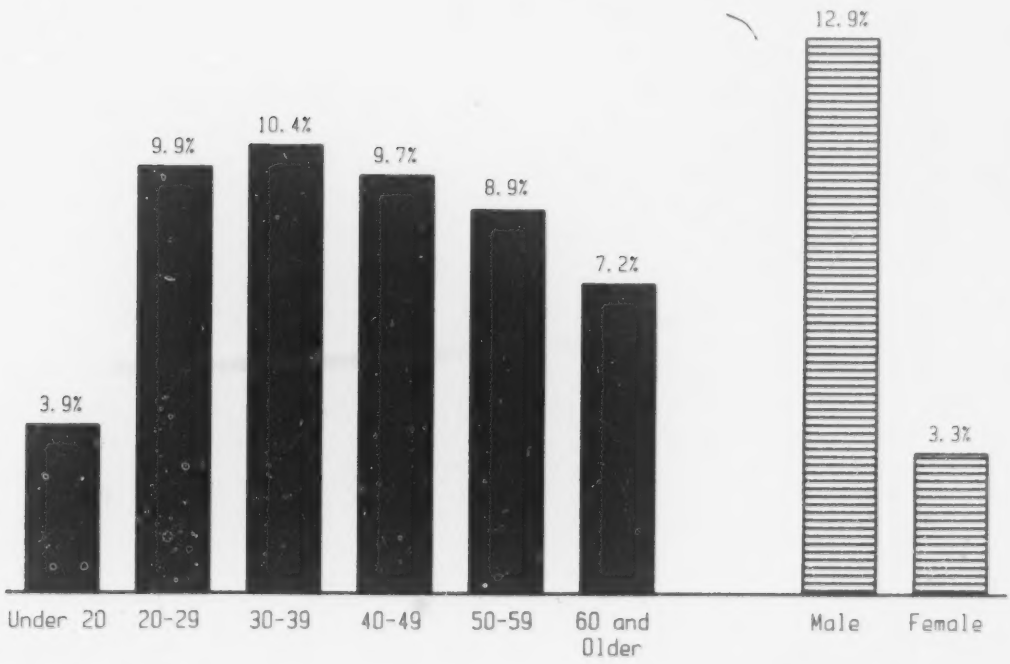
	Incidence of Golf Participation In Past 12 Months	National Population (Millions)
October 1985	8.0	17.52
October 1984	8.6	18.86
(Number of Respondents)	(34,685)	(219.00)

II. Incidence of Past Year Golf Participation by Demographics

A. Incidence of Past Year Golf Participation by Age and Sex

1. Incidence of past year golf participation is highest among the 30-39 age segment (10.4%). Similarly, about 10% of people 20-29 and 40-49 claimed to play golf one or more times in the past year. Only 4% of people under age 20 claimed past year golf participation.

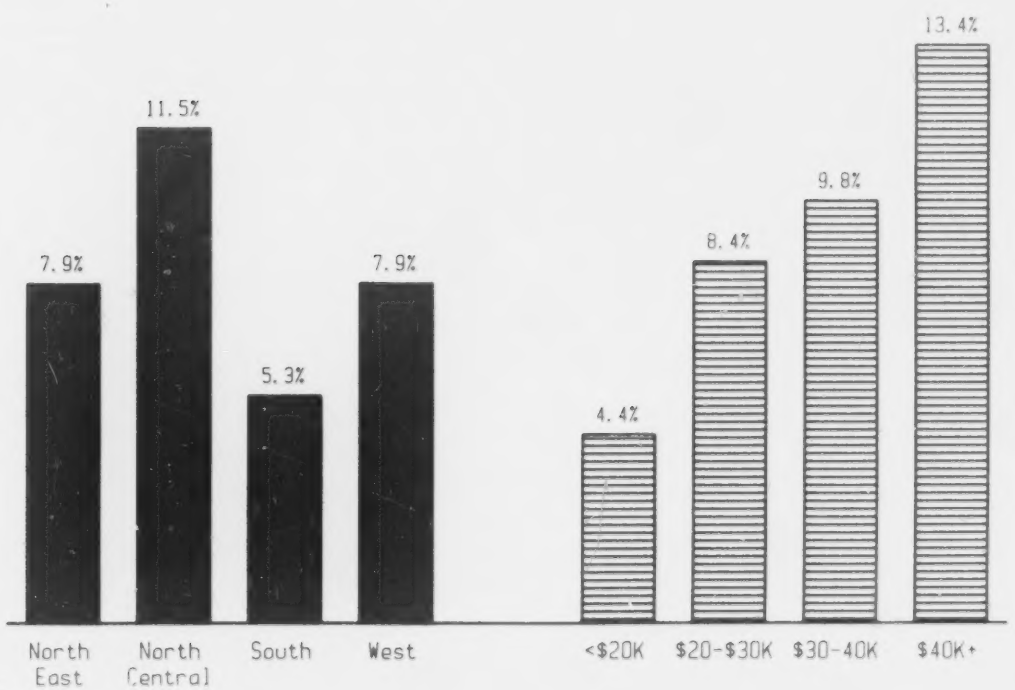
2. Incidence of past year golf participation is approximately 4 times greater among males (12.9%) than females (3.3%).



B. **Incidence of Past Year Golf Participation by Region and Income**

1. Incidence of past year golf participation is highest among people residing in the North Central region of the United States (11.5%) and lowest among people in the Southern region (5.3%). The claimed incidence of participation in the Northeast and Western regions of the U.S. (7.9%) is about equal to the overall national incidence.

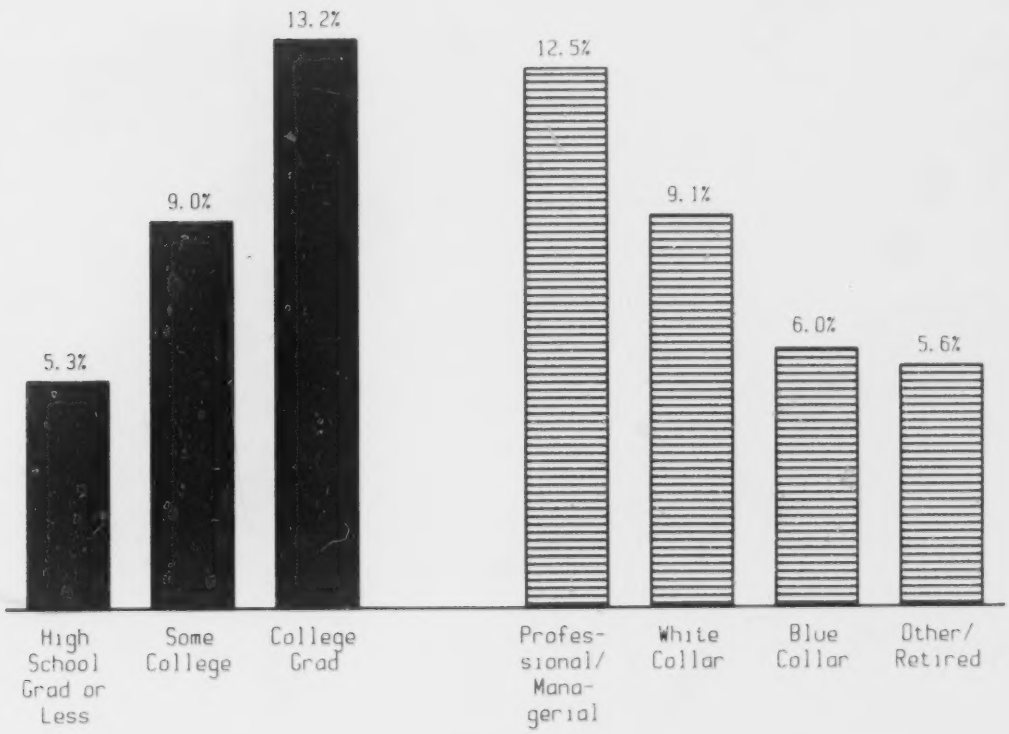
2. Incidence of past year golf participation is directly related to household income. Only 4.4% of people from households with incomes of under $20,000 claimed past year participation, whereas 13.4% of people from households with incomes of $40,000 or more reported past year participation.



C. **Incidence of Past Year Golf Participation by Household Head Education Level and Occupation Status**

1. Incidence of past year golf participation increases as household head education level increases. Only 5.3% of respondents from households with high school grad or less educated heads claimed past year participation compared to 13.2% for those in college grad head households.

2. Respondents from households headed by an individual employed in a professional/managerial/white collar position claim a significantly higher incidence of past year golf participation than those from other occupational groups (11.4% vs. 5.8%).



D. **Summary of Golf Participation Demographics**

Incidence of past year golf participation:

1. Is higher among the 20-49 age segment than other age segments (10.0% vs. 6.0%).

2. Is four times greater among males (12.9%) than among females (3.3%).

3. Is greatest in the North Central region of the U.S. (11.5%) and lowest in the Southern region (5.3%).

4. Is greatest among people in more upscale socioeconomic households:

   - $40,000 and over income (13.4%);
   - College grad educated (13.2%); and
   - Professionally employed (12.5%).

III. Growth/Decline in Golf Participation by Demographic Segments

A. First Time Golfers

1. About 2.44 million people, or 13.9%, of all past month golfers claimed to have played golf for the first time in the past 12 months.

2. The growth in new golfers is nearly two times larger among males (1.56 million) than females (.88 million). However, only about 1 in 10 past year males golfers played for the first time in 1985. In contrast, about 1 in 4 past year female golfers played for the first time in 1985.

3. People under age 30 represent over two-thirds of new (first time) golfers -- 1.64 million. Among all past year golfers under age 20, about one-third (36%) claimed to play for the first time in 1985.

4. The number of first time golfers is significantly larger in the North Central region of the U.S. relative to other regions. Close to 1 million (.96) people in the North Central region first played golf in 1985.

5. About one-half of new golfers have household incomes of $20,000 to $40,000 (1.15 million golfers).

GOLFED FOR FIRST TIME IN 1985

NGF

B. Change in Number of Golfers

1. Approximately 7.1% fewer people claimed to play golf in the 12 months prior to October 1985 than in the 12 months prior to October 1984.

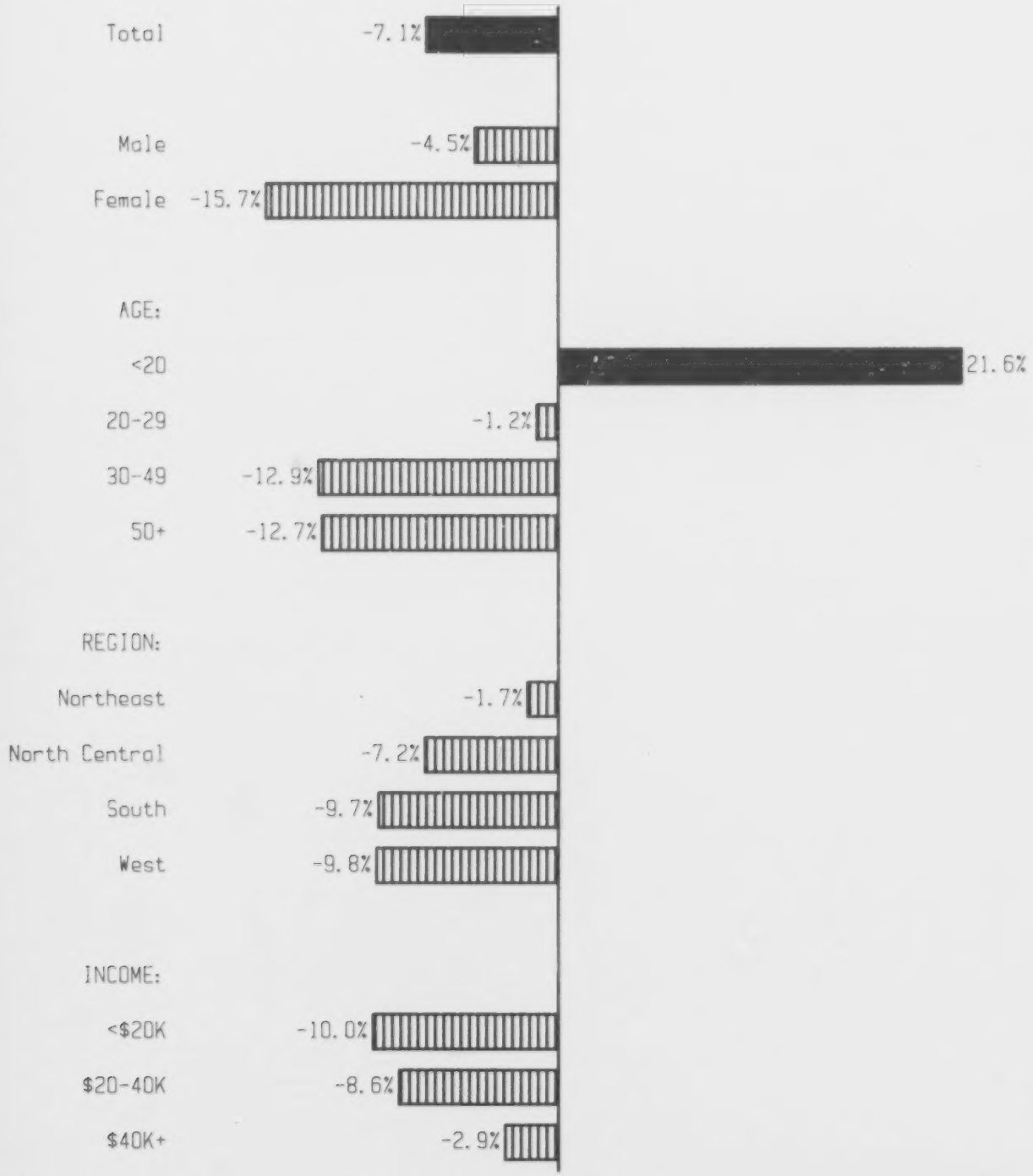
2. The decrease in incidence of past 12 month golfers was greater among females (-15.7%) than among males (-4.5%).

3. Incidence of past 12 month golf participation increased sharply for people under age 20. The number of past year golfers under age 20 was approximately 22% larger in October 1985 than in October 1984. The number of golfers age 20-29 changed marginally between periods, whereas the number of golfers over age 30 decreased about 13% between periods.

4. Incidence of past 12 month golf participation declined across all geographic regions between periods; however, the decrease was least severe in the Northeast region of the U.S. (-1.7%).

5. The decrease in past year golf participation between periods varied by income segments. Specifically, the decrease was greatest among the lowest income segment (under $20,000).

PERCENT CHANGE IN NUMBER OF GOLFERS BETWEEN 1984 & 1985



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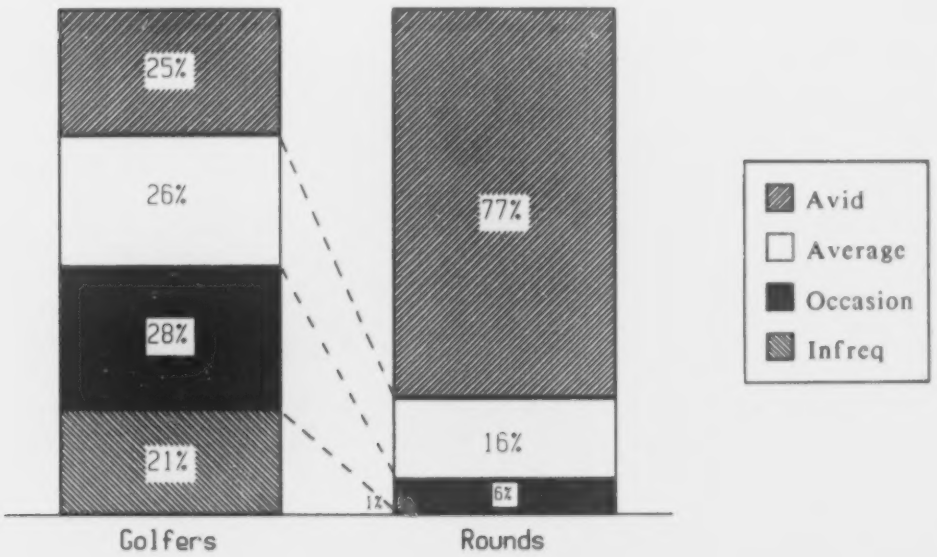
IV. Frequency of Golf Participation Nationally

1. Respondents were asked to specify the number of times they had played golf in the past 12 months. For purposes of analysis, golfers were categorized into four groups based on the number of times played.

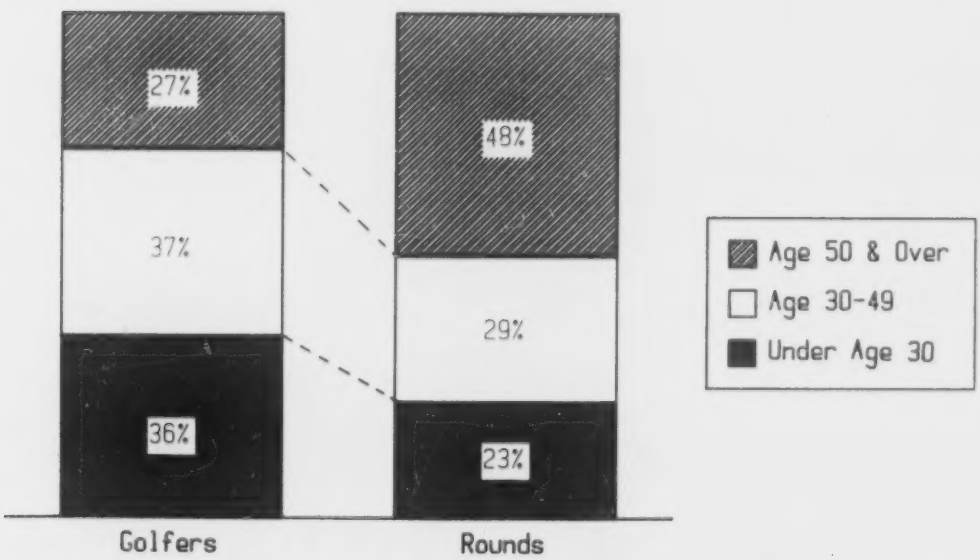
2. Golfers claimed an average of nearly 22 times played in the past 12 months (21.85). The median number of times played in the past 12 months was 8. Based on the complete distribution of rounds played, we estimate the total number of rounds played in the U.S. between October 1984 and 1985 to be 415 million.

Golfer Type	Number of Times Played	All Golfers October 1985 %
Infrequent	1 - 2 times	21
Occasional	3 - 7 times	28
Average	8 - 24 times	26
Avid	25 or more times	25
		100%
	Mean Times Played	21.85
	Median Times Played	8.00

3. Avid golfers (25 or more times played) represent 25% of all golfers, but 77% of all rounds played. Together, average and avid golfers represent about one-half (51%) of all golfers and account for 93% of all rounds played in the past 12 months.



4. Older age segments, age 50 and over, account for a disproportionately large share of rounds played in 1985 relative to other age segments. The 50 and over age segment represents 27% of all golfers but 48% of all rounds played in the past 12 months.



5. Golfers residing in the Southern and Western regions of the U.S. also account for a disproportionately large share of rounds played (41% of all golfers but 51% of all rounds played) relative to golfers in other regions.

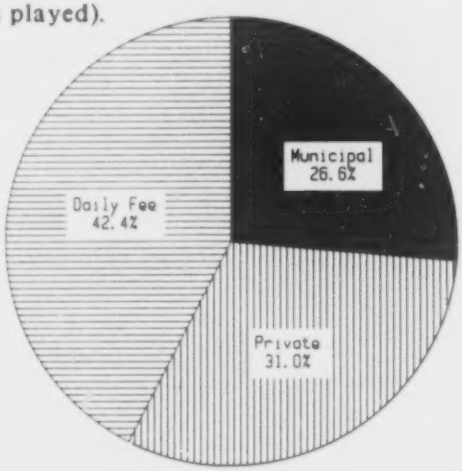
6. Frequency of golf participation does not vary significantly by household income segments.

	Golfers	Rounds
Region	%	%
Northeast	22	18
North Central	37	31
South	23	29
West	18	22
Income		
<$20K	23	21
$20K - $40K	43	42
$40K or more	34	37

V. Other Characteristics of Past 12 Month Golfers

1. Respondents were asked to indicate the percentage of rounds played in the past 12 months on various types of courses -- private, daily fee, and municipal. Overall, the greatest proportion of rounds were played on daily fee courses (42% of all rounds played).

	Number of Rounds (Millions)	Share of Rounds
Municipal Courses	110	26.6%
Private Courses	129	31.0%
Daily Fee Courses	176	42.4%
	415	100.0%



2. Golfers also specified their average number of shots over par for an 18 hole round of golf. On average, golfers claimed to shoot about 24 over par for an 18-hole round. The average was approximately 12 shots higher among females (33.8) than among males (22.1).

Strokes Over Par	All Golfers %	Males %	Females %
0 - 14	25	29	9
15 - 22	30	33	22
23 - 34	24	24	23
35 or over	21	14	46
Average	24.4	22.1	33.8
(Number of Respondents)	(2366)	(1894)	(472)

VI. Profile of Golfer Segments

A. Profile of Avid Golfers (25 or more rounds played)

Avid golfers, in contrast to the national population are:

1. More likely to be male (79% vs. 49%).

2. More likely to be over age 30 (80% vs. 57%), and particularly over age 50 (48% vs. 28%).

3. Found more frequently in the North Central region of the U.S. (34% vs. 25%) and found less frequently in the Southern Region (26% vs. 34%).

4. More affluent; 39% of avid golfers have household incomes of $40,000 or more compared to 20% of the national population.

		Total Population	Avid Golfers
		%	%
Sex:	Male	49	79
	Female	51	21
Age:	Under 20	23	7
	20 - 29	20	13
	30 - 49	29	32
	50 and over	28	48
Region:	Northeast	22	19
	North Central	25	34
	South	34	26
	West	19	21
Income:	Under $20K	42	20
	$20K - $40K	38	41
	$40K and over	20	39

B. **Profile of Avid Golfers (25 or more rounds played) In Contrast to Other Golfers**

Avid golfers, in contrast to other past 12 month golfers, are:

1. Older, 48% are age 50 and over compared to 21% of other golfers.

2. Found more frequently in the Southern (25% vs. 21%) region of the U.S.

3. More affluent; 39% have household incomes of over $40,000.

4. More likely to play at private golf facilities. Thirty-five percent of all rounds played by avid golfers were played at private facilities. Only 19% of rounds played by other golfers were at private facilities.

5. Better golfers; avid golfers average about 7 shots less per 18-hole round than other golfers.

C. **Profile of Infrequent Golfers (1 - 2 rounds played in past year) In Contrast to Other Golfers**

Compared to other golfer segments, infrequent golfers are:

1. More likely to be female (26% vs.20%).

2. More likely to be between the ages of 20 and 49 (74% vs. 58%).

3. Less affluent; 29% have incomes of under $20,000 compared to 21% for other golfers.

4. More likely to play at daily fee golf facilities (55% vs. 42%).

GOLFER PROFILES

		Avid Golfers	All Other Past Year	Infrequent Golfers	All Other Past Year
		%	%	%	%
Sex:	Male	79	77	74	80
	Female	21	23	26	20
Age:	Under 20	7	13	11	11
	20 - 29	13	28	28	24
	30 - 49	32	38	46	34
	50 and over	48	21	15	31
Region:	Northeast	19	23	21	22
	North Central	34	38	41	36
	South	26	21	20	23
	West	21	18	18	19
Income:	Under $20K	20	24	29	21
	$20K - $40K	41	44	45	43
	$40K and over	39	32	26	36
Share of Rounds at Course Type:					
	Municipal	26	28	24	27
	Private	35	19	21	31
	Daily Fee	39	53	55	42
Average Strokes Over Par		19.4	26.3	29.6	23.1

APPENDIX

SURVEY INSTRUMENT

(5-G402)

(Please Read and Answer THIS Side First)

Dear Panel Member,

The questions on this card are all about GOLF. Specifically, I am interested in knowing whether you or anyone in your household played GOLF in the past 2 years. I also have a few questions about golf participation for each household member who has played GOLF in the past 12 months.

NOTE: I am not interested in golf played on miniature golf courses. Please do not include golf played on miniature golf courses in your answers.

Thank you for your help.

Cordially,

Marie

1. Have you or has any member of your household played GOLF in the past 2 years? ("X" ONE) (9)

   Yes.. []1 ---> (CONTINUE)
   No... []2 ---> (THANK YOU. RETURN CARD.)

2a. Has any member of your household played golf in the past 2 years BUT NOT in the past 12 months? (10)

   Yes.. []1 ---> (CONTINUE)
   No... []2 ---> (SKIP TO QU. 3)

2b. Please describe the age and sex of these golfers who have not played in the past 12 months. (RECORD AGE AND SEX.)

   1. Age:____ Male []1 Female []2 (11-13)
   2. Age:____ Male []1 Female []2 (14-16)
   3. Age:____ Male []1 Female []2 (17-19)

3. How many members of your household played golf in the past 12 months? (WRITE IN NUMBER.)

   #____ Household Members (20)

IF NO ONE IN YOUR HOUSEHOLD HAS PLAYED GOLF IN THE PAST 12 MONTHS - PLEASE RETURN CARD.

PLEASE REFER TO THE FOLLOWING GOLF COURSE DEFINITIONS WHEN ANSWERING QU. 5 ON THE OTHER SIDE OF THE CARD.

- A private golf course is a golf facility that restricts play to members and their guests.
- A daily fee golf course is a privately owned facility that is open to the public.
- A municipal golf course is a facility that is owned by a tax supported agency such as a city, county, school or park district and is open to the public.

(5-G402)

(Please Read and Answer OTHER Side First)

The questions below are about each household member who played golf at least once in the past 12 months. I would like you to act as my interviewer when answering these questions. First, write in the age and sex of each household member (up to three) who played golf at least once in the past 12 months. Then, ask questions 4-7 and record answers for each golfer in your household.

	GOLFER #1	GOLFER #2	GOLFER #3
RECORD AGE AND SEX OF EACH GOLFER →	Age:____ Male []1 Fem. []2	Age:____ Male []1 Fem. []2	Age:____ Male []1 Fem. []2
	(21-23)	(40-42)	(59-61)
4. About how many times during the past 12 months did you play golf? (RECORD NUMBER OF TIMES.)	Times:____	Times:____	Times:____
	(24-26)	(43-45)	(62-64)
5. Thinking about all of the rounds you played in the past 12 months, what percent of the rounds you played were played on ... (WRITE IN PERCENT FOR EACH)...	(27-35)	(46-54)	(65-73)
Private courses....	____ %	____ %	____ %
Daily fee courses..	____ %	____ %	____ %
Municipal courses..	____ %	____ %	____ %
TOTAL MUST EQUAL 100%:	100%	100%	100%
6. On average, about how many strokes over par do you shoot for an 18-hole round of golf? (WRITE IN STROKES OVER PAR.)	Strokes Over Par:____	Strokes Over Par:____	Strokes Over Par:____
	(36-37)	(55-56)	(74-75)
7. At what age did you start playing golf? (WRITE IN)	Age:____	Age:____	Age:____
	(38-39)	(57-58)	(76-77) (80)1